TS EAS

Wednesday, 22nd May: 6am PST / 7am MST / 8am CST / 9am EST/ 1 pm UTC / 2pm BST / 3pm CEST, CAT, SAST / 4pm EEST / 6:30pm IST / 9pm CST / 11pm AEDT

Notes

All

Reports and status updates

Team leads and liaisons

Lara: Standards Committee

Standards Committee

- Standards Annual Meeting, July 16 at 9 PST/10 MST/11 CST/12 EST/18 CEST
- Standards is working on revising procedures documents and should finish this summer
 - Clarifying instructions and adding more detail about parts of the process
 - Drafting instructions around DEIA for standards (in consultation with Diversity Committee)
- Consulted with SAA leadership re; RiC and ICA (still awaiting response from leadership)
- Multiple standards currently in the process of revision or creation:
 - o EAD
 - Accessioning Best Practices
 - Guidelines for Accessible Archives
 - Guidelines for Primary Source Literacy
 - Standardized Statistical Measures for Public Services

Janaya: SAA EAS Section

EAS Section

- New members:
 - Janaya Kizzie, Co-Chair, 2023-2025
 - Jacqueline Devereaux Asaro, Steering Committee Member, 2023-2025
 - Laurie Lee Moses, Steering Committee Member, 2023-2025
- Regrouping.

Updates from the co-chairs

Co-chairs

SAA annual meeting Chicago 2024

- TS EAS approved proposal for session at SAA annual meeting in Chicago
 - o Approved: Morning session similar to the previous EAD Brown bag lunches
 - Tentative on the Friday morning
- Agenda for our annual TS EAS meeting (August 12-14, 2024) is in the planning
 - Preliminary draft
 - August 12-13, 2024: 2 full-days meeting devoted to EAD 4.0 revision (internal meeting)
 - Review feedback from call for comments
 - Possible open meeting with software providers/developers if there is an interest
 - Updates/next steps
 - August 14: 1 full-day meeting for TS EAS
 - Morning: opportunity for sub-teams to meet
 - Afternoon: 1.5-2 hour open meeting for TS EAS (in-person/hybrid)
- Invitations will be sent out!
 - We are pushing them!

SAA Updates

- SAA Council meeting May 1-2 2024
 - Just a reminder that we submitted the following for the May SAA Council meeting
 - Regarding financial support for TS EAS annual meeting in Chicago room/av equipment
 - Regarding financial support for TS EAS annual meeting in Chicago food for onsite participants
 - Travel is not something that will be supported by SAA
 - Questions not discussed then, moved forward. Finance committee will be meeting sometime in June to discuss the above. Hopefully we'll hear something soon thereafter.
- Memberships
 - No news about new/re-appointed members
 - No news regarding early career member

Upcoming work

- Functions
 - Call for comments on white paper and examples
 - Use your channels to inform about the call for comments
- EAD
 - A lot of webinars, participate!
 - Volunteer to aid with the revision even if you are not in the EAD team following what will be introduced next
 - Use your channels to inform about the revision
- Annual report to Standards
 - Make sure your notes are in GitHub so we can summarize!
- Revision planning
 - Us co-chairs to prepare info to Standards
 - Plan for all EAS Standards

EAD revision

Kerstin: EAD

What happened since February

- Call for Comments on draft for EAD 4.0 published on 19 April
- Will remain open until 28 July
- EAD team will continuously pick up on comments submitted via <u>GitHub</u>, the <u>web form</u> on the SAA website, or <u>email</u> during its monthly meetings
- Have set up a folder, where PDF print-outs of comments received via the web form or email can be saved, before being transferred to GitHub
- Have agreed a schedule for comment tracking between all EAD team members

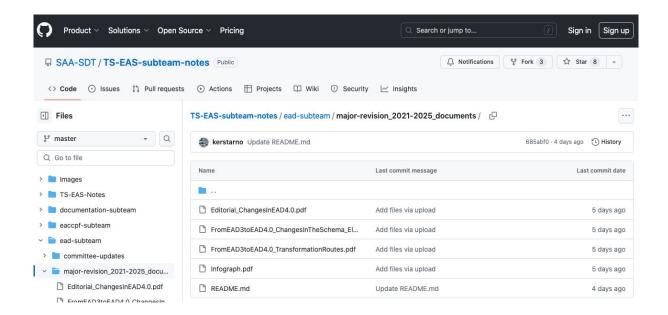
Please help distributing the call for comments via your national and personal professional channels!

This includes reminders throughout the whole period of the call for comments being open.

Find all information on the SAA website



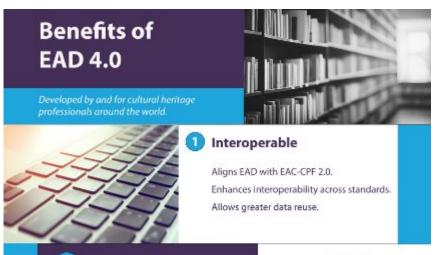
Find all information on GitHub



https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/ead-subteam/major-revision 2021-2025 documents

What the Call for Comments currently includes

Benefits of EAD 4.0 infographic









Focuses on EAD as a data encoding and exchange standard.

Enhances linked data support.

Supports relations comprehensively.



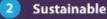
Extensible

Streamlines specific elements into reusable ones.

Enables reuse of external formatting schemas.

Limits mixed content to three built-in elements.





Implements the latest archival concepts and models.

Improves linking between descriptive elements.

Supports richer relations between records and agents.



Learn more about how you can participate in the EAD 4.0 revision at either ts-eas@archivists.org or

https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas

All images in this infograph are from the Harvard Business School license of Adobe Creative Cloud.

The Descriptive Notes blog

- Series of five posts
 - Two have been published so far
- Introducing the general lines of the revision process and the new version
- Starting from the perspective of archival description
- Adding details on encoded archival description where suitable
- Keeping it light
- Providing links for further, more detailed reading and engagement

Shape the Future of EAD: A Call to Action – Part II



By Kerstin Arnold, Cory Nimer, and Mary Samouellan

In our <u>first blog post</u>, we introduced you to the major revision of the Encoded Archival Description (EAD) standard. We gave an insider's look into the revision process, including why the standard is being revised, how it is being revised, and what actions you can take to participate. This post, the second in a series of five, examines the work that has been done to align EAD 4.0 with its sibling standard, <u>Encoded Archival Context – Corporate Bodies, Persons, and Families (EAC-CPF)</u>.

The Editorial

- Textual description of the main aspects of the new version
 - What were the drivers behind a change?
 - What did the change result in?
- Providing an overview
- Going into some more detail where necessary and useful
- Linking to single GitHub issues including all the details
- → Use the Table of Contents to navigate to the sub-chapter that interests you

Major revision of EAD

- 1. Introduction
- 2. A general note to start with
- 3. Alignment with EAC-CPF
 - 3.1. Introduction of camelCase spelling
 - 3.2. Aligning the definition of shared elements
 - 3.2.1. <control>
 - 3.2.2. Date elements <date>, <dateRange>, and <dateSet>
 - 3.2.3. Elements to encode places and place names
 - 3.2.4. <relations> and shared entity elements
 - 3.2.5. In-line tagging for shared elements
 - 3.3. Aligning the definition of shared attributes
 - 3.3.1. Attributes for internal and external referencing
 - 3.3.2. Other changes regarding attributes
- 4. Describing various instances of a finding aid
- 5. Relations and relationships
- 6. Formatting and in-line tagging
- 7. Additional changes for existing elements

1. Introduction

The revision of the Encoded Archival Description (EAD) was approved by the Society of American Archivists' (SAA) Council according to the SAA's standards revision cycle at the end of 2020. The work of revising EAD is being carried out by a team of the Technical Subcommittee on Encoded Archival Standards (TS-EAS), a group supported by SAA and overseen by their Standards Committee. The EAD team has been working on the revision since early 2021 to the current date (end of February 2024), which has led to the creation of an initial draft for EAD 4.0.

The Revision notes

- Textual description of the changes compared to EAD3
- Providing details of the revision
- Explaining what has changed
- Listing elements and attributes affected by a specific change
- Grouping type of changes
- Following the structure of an EAD instance for element-specific changes
- → Use the Table of Contents to navigate to the sub-chapter that interests you

Revision notes

Version control

Deprecated elements and attributes of EAD3

Spelling and naming of elements and attributes

List of removed, renamed or replaced elements and attributes

Elements

Removed elements

Replaced elements

Elements with camelcase spelling applied

Renamed elements

Attributes

Removed attributes

Attributes replaced by encoding from other namespaces

Replaced attributes

Attributes with camelcase spelling applied

Renamed attributes

List of new elements and attributes

New elements

New attributes

Common schema principles

Flements

The EAD 4.0 draft schema

- The technical expression of the draft for the new version of EAD
- Available in three file formats
 - o .xsd
 - .nvdl (to combine EAD 4.0 and XHTML validation)
 - .rng (wrapped into the zip and tar.gz packages)
- Comes with a schematron for more specific validation
- → Download your preferred schema type or get the GitHub URL

This release includes the following schemas for testing:

- ead-4-dev.xsd: This is the w3c XSD serialization of the EAD 4.0 draft schema.
- ead.nvdl: If you would like to experiment with the XHTML embedding options in EAD 4.0, start here. For more about NVDL, see https://en.wikipedia.org/wiki/Namespace-based_Validation_Dispatching_Language
- ead.sch: This is the draft version of the EAD 4.0 schematron, which we recommend using to
 ensure that machine-readable dates are encoded correctly.

To get started, rather than creating an EAD 4.0 file from scratch, we suggest that you copy the following EAD 4.0 test file, which is pre-associated with both the draft schema and schematron: https://raw.githubusercontent.com/SAA-SDT/EAS-Best-Practices/examples/ead4-call-forcomments/ead4-starter-file.xml

▼ Assets 5		
⊕ead-4-dev.xsd	153 KB	3 weeks ago
⊘ead.nvdl	808 Bytes	3 weeks ago
⊘ ead.sch	132 KB	3 weeks ago
Source code (zip)		3 weeks ago
Source code (tar.gz)		3 weeks ago

The Transformation routes table

- Tabular and detailed overview of how a specific element needs to be transformed to get from EAD3 (deprecated) to EAD 4.0
- Listing all EAD3 elements in alphabetical order and naming their EAD 4.0 equivalents
- Providing a transformation route for each element, its content, and attributes
- → Search for an the element of interest to see which changes would need to be applied to adapt it to EAD 4.0

conventiondeclaration	conventionDeclaration	Apply camelCasing Rename sub-elements abbr to shortCode and citation to reference Apply camelCasing to sub-element descriptiveNote Make sure sub-element reference comes first, followed by shortCode (if existing) and descriptiveNote (if existing)
-----------------------	-----------------------	---

Remove @encodinganalog and include a comment about the removal; if control or ead indicates a relatedencoding according to MARC21, add the MARC21 namespace and use the attribute @marc21:tag in conventionDeclaration to include the value of @encodinganalog (xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="...")

Remove @localitype and include a comment about the removal

The Changes in the schema table

- Tabular and detailed overview of how the definition of a specific element changes in EAD 4.0 compared to EAD3 (deprecated)
- Listing all EAD3 elements in alphabetical order and naming their EAD 4.0 equivalents
 - o If an element is replaced by or integrated with another and thereby removed from the EAD 4.0 schema, consult the Transformation routes table for more details
- Also listing all new EAD 4.0 elements
- Including some statistical counters e.g. about attribute groups and their usage across EAD 4.0 or about the coverage of specific content models
- Linking to relevant GitHub issues that document these schema changes
- → Search for an the element of interest to see how its definition changes in EAD
 4.0 compared to its definition in EAD3 (deprecated)

The Example files

- ead4-starter-file.xml
 - An EAD 4.0 file including all mandatory elements with some test information
 - Already associated with the .nvdl schema and the schematron for validation
 - → Use for some hand-coding to get a feeling for EAD 4.0 from scratch
- LoC EAD3exampleAdapted.xml
 - An EAD3 file downloaded from the LoC catalogue on 24 January 2024
 - For the current version of the EAD3 source file, see: https://findingaids.loc.gov/exist_collections/ead3master/mss/2003/ms003077.xml
 - Manually adapted to EAD 4.0 (same approach as in Option 1 for reviewing the EAD 4.0 draft schema)
 - Changes have been commented in the file itself
 - → Review the comments to get an understanding of how a transformation to EAD 4.0 could look like

Supporting activities

Descriptive Notes blog posts

- We are planning three more blog posts
 - Early June
 - Early July
 - Early September
- Please feel free to share the posts once they are published
- Can also be used as reminders of the call for comments

Open Drop-in Sessions

- A series of four open drop-in sessions
- Brief presentation of one strand of activities and changes for EAD 4.0
- Informal option for the community to ask questions and provide feedback
- We started with two iterations on 24 April (same content, different time zones)
 - Focus: How to contribute to the Call for Comments
 - Already available on <u>SAA's YouTube channel</u>
- We had the second session today (timewise aiming at Europe, Africa, Asia)
 - Focus: Alignment with EAC-CPF and what this means for EAD 4.0
 - Slides available on the <u>SAA website</u> and on <u>GitHub</u>

Open Drop-in Sessions

- Two more sessions to come
 - o 18 June, 6am UTC
 - Focus: Extensibility of EAD 4.0 (e.g., by streamlining specific elements into reusable ones, enabling reuse of external formatting schemas, allowing step-by-step expansion from textual to linked data)
 - Registration:
 https://us06web.zoom.us/meeting/register/tZAscuCopz4tGNAzYgdjcTFQ7Zxs8VCQUMk
 W#/registration
 - o 9 July, 4pm UTC
 - Focus: EAD 4.0's sustainability and exchangeability (improving linking in general, approaching relations more comprehensively, implementing the latest archival concepts) Registration:

http://societyofamericanarchivists-316.my.webex.com/weblink/register/r8a0c096c3e8a2b5e33114f17ce7113f6

What the EAD team is currently working on

What the EAD team is currently working on

- A draft Tag Library for EAD 4.0
- Revision notes (compared to EAD 2002)
- Transformation routes (compared to EAD 2002)
- More example files
- A draft conversion from EAD3 to EAD 4.0
- Best Practice Guide extensions for EAD 4.0

How you can help

Work on the "EAD 2002"-based documentation

- Using the EAD3 based transformations table and revision notes as a basis and adapting this to EAD 2002
 - Requires working with the EAD 2002 and the draft EAD 4.0 schemas and comparing these in detail
 - Aims to provide an entry point for anyone working with EAD 2002 into this current major revision (which we get asked about a lot)

- Taking one or two example files from your own context (in either EAD3 or EAD 2002)
- Adapting these manually to become valid EAD 4.0 example files (suggestion: start with a shorter, less complex example first and continue to a longer, more complex example if you have the time)
- Adding comments of the changes you make as you move along to illustrate what needs to be adapted

Helps community members to understand the impact of a change from their EAD version to the newest version and helps TS-EAS in preparing a conversion

- For the hand-coders and hands-on reviewers
- Open an existing EAD XML file (either EAD3 or EAD 2002) in your XML editor
 - Start with a short file first and maybe move on to a longer file in a next step if wanted
- Associate your EAD XML file with the EAD 4.0 schema, by changing from

- Your XML editor will start showing you those elements and attributes in your existing file that do not conform to the new version
- Your XML editor will also show you what might need to be changed
- Follow the validation messages step by step, including comments about your changes, until you get to a valid EAD 4.0 file

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- Downloaded on 22 April 2024 from https://www.riamco.org/render?eadid=US-RPD-02.10 -->
<ead xmlns="https://archivists.org/ns/ead/v4" xmlns:xlink="http://www.w3.org/1999/xlink"</pre>
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xsi:schemaLocation="https://archivists.org/ns/ead/v4
    https://raw.githubusercontent.com/SAA-SDT/eas-schemas/release_2024_03/xml-schemas/ead/ead-4-dev.xsd
    http://www.w3.org/1999/xlink http://www.loc.gov/standards/xlink/xlink.xsd"
    audience="external" relatedencoding="MARC21">
    eadheader audience="exte Validierung:
        scriptencoding="iso15
                                                                                        511"

    Attribute 'relatedencoding' is not allowed to appear in element

        langencoding="iso639
                                  'ead'.
        <eadid countrycode="L
                                                                                        D-02.10</eadid>
```

```
<ead xmlns="https://archivists.org/ns/ead/v4" xmlns:xlink="http://www.w3.org/1999/xlink"</pre>
   xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
   xsi:schemaLocation="https://archivists.org/ns/ead/v4
   https://raw.aithubusercontent.com/SAA-SDT/eas-schemas/release_2024_03/xml-schemas/ead/ead-4-dev.xsd
   http://www.w3.org/1999/xlink http://www.loc.gov/standards/xlink/xlink.xsd"
   audience="external">
   <!-- Changed eadheader to control and applied according changes to sub-elements and attributes;</p>
        applied camelCasing; moved filedesc into findAidDesc; removed @relatedencoding -->
   <control audience="external" countryEncodina="iso3166-1" dateEncodina="iso8601" [46 lines]</pre>
   <TindAlaDesc nref= 02.10.xml > |4 lines|
   <findAidDesc> [31 lines]
   <!-- Applied camelCasing and changes in names to <archDesc> and its sub-elements -->
   <!-- Removed @relatedencodina -->
   <archDesc level="collection" localType="inventory">
       <!-- Renamed -->
       <identificationData> [24 lines]
       <agents> [19 lines]
       <formsAvailable> [4 lines]
       <scopeContent> [7 lines]
       <!-- Changed @encodinganalog to @marc21:tag and added MARC21 namespace; applied formattingExtension -->
       <bioqHist xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="545"> [36 lines]
       <!-- <descarp type="descriptive">
           <head>Collection information/head> -->
       <accessConditions xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="506"> [3 lines]
       <useConditions xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="540"> [5 lines]
       <preferCite xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="524"> [2 lines]
       <scopeContent xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="520"> [23 lines]
       <arrangement xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="351"> [12 lines]
       <!-- </descgrp>
       <descarp type="administrative">
           <head>Administrative information</head> -->
       <sourceOfAcquisition xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="541"> [3 lines]
       <!-- </descarp>
```

Manually adapted EAD 2002 XML file now valid against the EAD 4.0 draft schema

Note that adapting an EAD 2002 XML file will, by default, also require the changes that would already apply for a transformation to EAD3, e.g. changing from eadheader to control

Help define the EAS lists of attributes' values

list id	concept > label	scope note (definition)	reference
addressLineType		To identify the different parts of a physical address eg for public access or to contact and/or communicate with someone by postal services.	EAG (Encoded Archival Guide), http://www.apex-project.eu/index.php/en/outcomes/standards/eag-2
	county	Second-level administrative division where a geographic location or feature is located; in a specific national context, this could be a canton, a commune, a county, a department, a district, a prefecture, a province, a subprefecture, etc.; note that a term used for a second-level administrative division in one country might be used for a first-level administrative division in another country	ISDIAH chapter 5.2.1 Location and address(es), https://www.ica.org/app/uploads/2023/12/CBPS_2008_Guidelines_ dition_EN.pdf
	country Country where a geographic location or feature is located district Area of a bigger city or town where a geographic location or feature is located		
ř.	municipality	City, town, or village where a geographic location or feature is located	
	postBox	Post office box (postal box) number as part of the physical or postal address of a geographic location of feature	
	postalCode	Postal code (ZIP code) as part of the physical or postal address of a geographic location of feature	

What will happen next

EAD team meeting on 12 and 13 August

- After the Call for Comments closes on 28 July, there will be two weeks before the EAD team meeting on 12 and 13 August in Chicago to review the final comments
- During the meeting, we will aim to go through and decide as many of the comments received as possible
 - Ideally, we will already have been able to do this in the monthly meetings in June and July to some extent
- We also will specifically look at the question of converting to EAD 4.0 and the question of whether or not we will follow through with creating a core and an extended schema of EAD 4.0

Any other business items?

All

Thank you!

Next all TS-EAS meeting:

- SAA Annual meeting
- October
- February (aim: time better for members in the timezones with more than +5 from GMT)
- May